AiM 4.1User Manual for Custodial Staff

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Introduction

This manual will provide an overview of the AiM application, modules, and step-by-step instructions to complete individual screens within the modules.

Based on an individual's role the setup and modules available will determine the options available to users for use when working with this application.

Overview

In this manual you will learn how to:

- Identify terminology
- Logon to AiM application
- Identify icons
- Select a module
- Work with screens
- Perform a search query
- Create a personal query
- Use Note Logs
- Create a timecard using Rapid Timecard Entry
- Make corrections/changes to timecards
- Add descriptions to timecards

AiM Navigation

Getting Started

This section is designed to provide general navigation information that is needed when working with the AiM application. It includes terminology and steps for accessing and navigating the system.

Terminology

This list provides a description of terms referenced in this manual and used in the AiM application.

Closed work order	A closed work order indicates that all work has been completed and all materials have been charged to the work order. It does not imply that all charges have been billed.
Customer Request	The customer request is the screen used to submit on-line requests for work. It defines what work is to be performed, who the work is for, and where the work is located. A customer request must be approved to become a work order.
Multi-shop work orders	These are work orders that require involvement of multiple shops to get a job done. The first shop assigned to a multiple shop work order is the "responsible" shop for coordinating the closure of the work order.
Non-Reimbursable	A work order is considered non-reimbursable if the work is routine maintenance to I&G funded buildings. An example of a non-reimbursable work order is moving furniture on campus.
Open work order	An open work order is a work order that is being actively worked on by shops. Shops can charge time and material to an open work order.
Non-Shop Stock	Inventory that is maintained in the Main Warehouse.
Phase	The phase is used for tracking each task performed in a work order. It defines the specific task details including: the work to be performed, the location of the work, who will perform the work, which asset or equipment is worked on, and when to perform the work.
Property	Identifies the building and is represented by an assigned number in the AiM system.
Reimbursable (Billable)	A work order is considered reimbursable if the work includes non-routine maintenance of I&G funded buildings or is not I&G related. Examples of reimbursable work are moving furniture off campus or setting up tables and chairs on campus.
Rapid Timecard Entry	The rapid timecard entry screen is used to quickly enter multiple time card records in a single entry screen. This will be the method for time entry for all non-exempt employees.
Shop Stock	Most of the OFS inventory is maintained in the Warehouse, but some areas maintain a small inventory within their shops. This inventory is known as shop stock.
Single shop work order	Work orders that can be completed within a single shop. A single shop work order may evolve into a multiple shop work order.
Work Order	The work order is the main screen used for tracking work in the system. It defines what work is to be preformed, who the work is for, where the work is located, and how the work is classified.
Closed phase	A work order may have multiple shops (phases) involved. If a work order phase is closed for a particular shop, that shop cannot charge time or materials to that work order. Other shops assigned to work order may charge time and material to the work order as long as the phase is still open.

Logging on Process

AiM supports authenticated user access, meaning that the system verifies your credentials and you are given access to the system based on your assigned security. To use AiM as an authenticated user, you must successfully logon by providing your credentials: MyNMSU Username and Password.

AiM can be accessed from any Internet browser such as Internet Explorer, Netscape, or Mozilla Firefox.

1. Type **http://fms-prod.nmsu.edu/fmax** in the address bar of your web browser and press Enter.

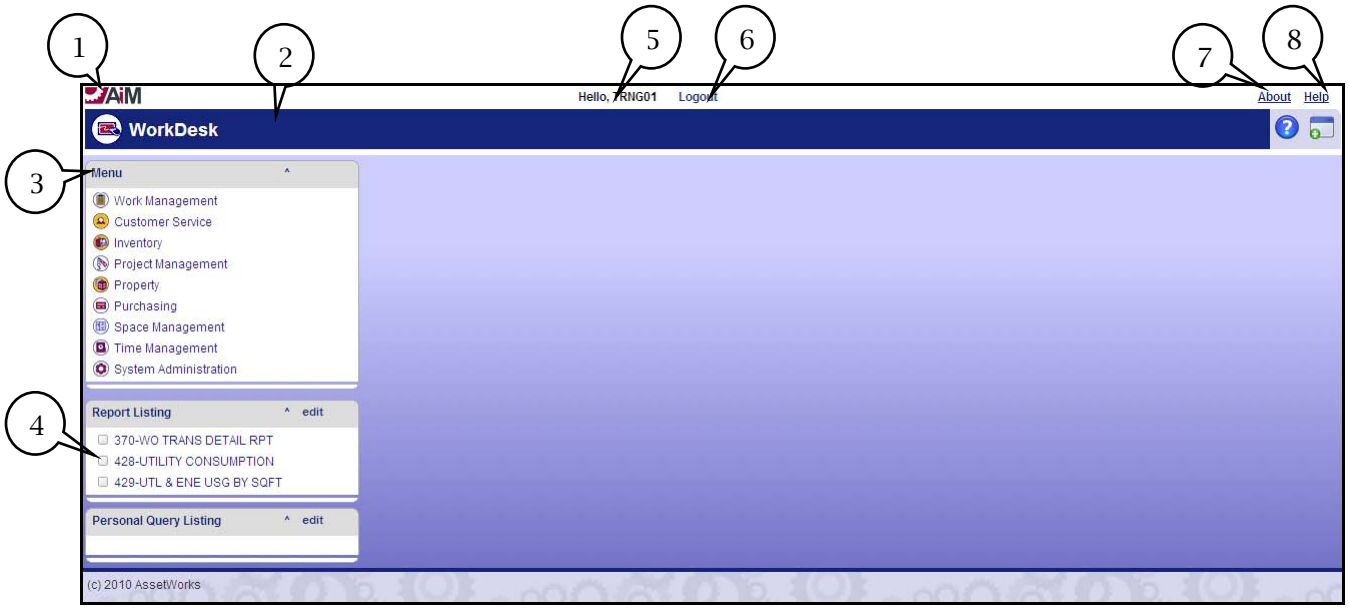
The logon splash page will be displayed.

2. Enter your **User Name** and **Password** in the field boxes.
3. Click on the **Login** button.

Team Tip:

You can create a bookmark in your browser for quick access to the AiM system.

Once you have logged on the *WorkDesk* will be displayed.



1. AiM icon identifies the vendor.

   Note: When navigating away from the *WorkDesk* and working within the application it may be necessary to return to the *WorkDesk*. This can be performed by clicking on the *AiM* icon.

2. The **header** will display the WorkDesk and a *Module* once selected.
3. **Menu** will display Modules available for use (based on security Menu options may vary).
4. **Reporting Listing** will display a list of available reports. Reports listing will also be accessible from various Modules.
5. Greeting and **User ID** are displayed and identify the current logged on user.
6. **Logout** link is displayed and used to exit the application.

   Note: It is recommended to logout properly from the application by using the *logout* link.

7. **About** provides vendor information and version of application.
8. **Help** provides access to on-line Help (this information comes with the application).

Once logged on, use the icons within the application to navigate; do not use the browser options available. To properly logoff, use the *Logout* link; do not use the *X* (exit browser options).

Navigation Icons

Below is a list of the common navigation icons that may be displayed while working within the application.

Icon	Description	Keyboard Short Cuts	Icon	Description	Keyboard Short Cuts
	New	Alt + I		**Quick Find Filter**	Alt + F
	Edit	Alt + E		**Zoom**	Alt + Z
	Back to Browser	Alt + B		**Cancel**	Alt + C
	Save	Alt + S		**Done**	Alt + O
	Copy Record	Alt + Y		**Previous Browse**	Alt + P
	Email Record	Alt + M		**Next Browse**	Alt + N
	Print	Alt + J		**First Browse**	Alt + F
	Export	Alt + V		**Last Browse**	Alt + L
	Execute Search	Alt + S		**Go**	Alt + G
	Search	Alt + S		**Next**	Alt + 3
	Help	Alt + ?	**Intentionally left blank**	**Intentionally left blank**	Intentionally left blank

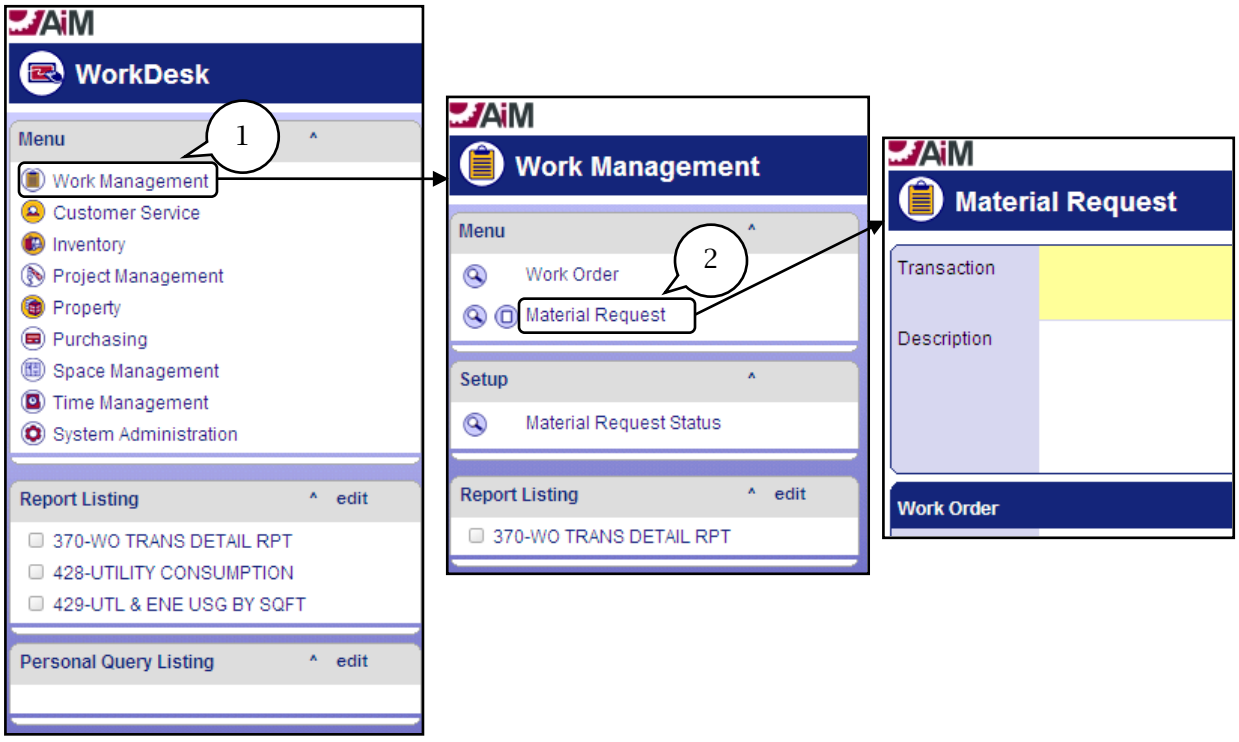
Below is a list of additional icons that may be displayed while working within the application.

Icon	Description	Keyboard Short Cuts	Icon	Description	Keyboard Short Cuts
	Add Detail Record	Alt + A		**Error Log**	Alt + L
	Delete Detail Record	Alt + D		**Error Flag**	Intentionally left blank
	Approve/Yes	Alt + A		**Reset**	Alt + R
	Reject/No	Alt + R		**Add Query**	Alt + A
	Generate	Alt + G		**Remove Query**	Alt + D
	Add Content(WorkDesk)	Alt + I		**Reset (WorkDesk)**	Alt + R

Note: The keyboard short cuts are dependent on the screen displayed.

Navigation from WorkDesk to Module to Screen

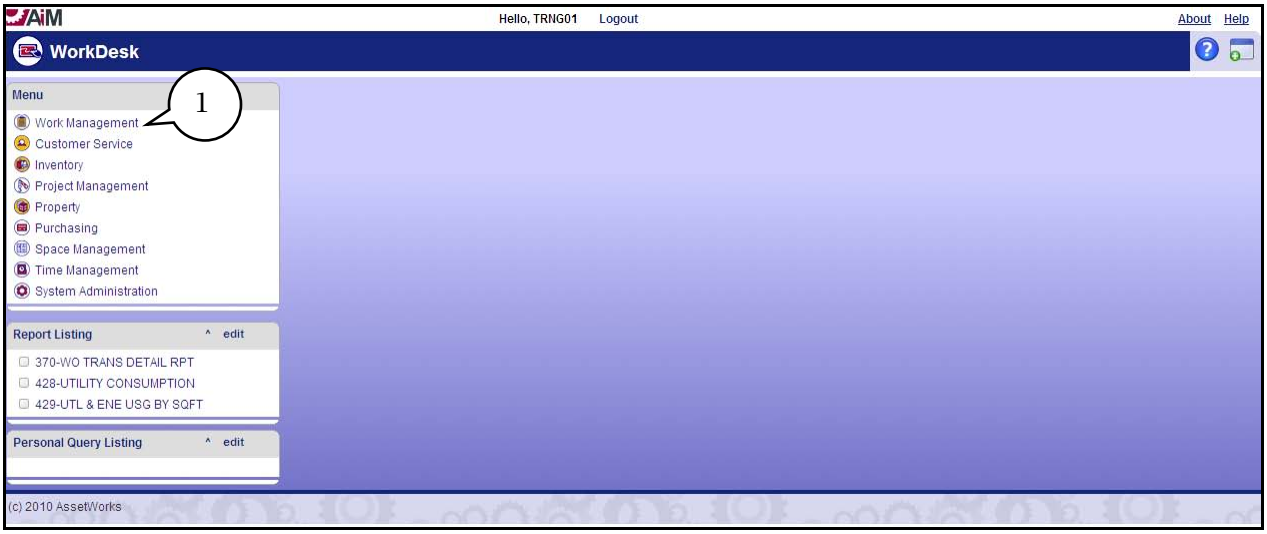
Displayed below is the flow to access a screen from the *WorkDesk*. This process is applicable for accessing all modules.



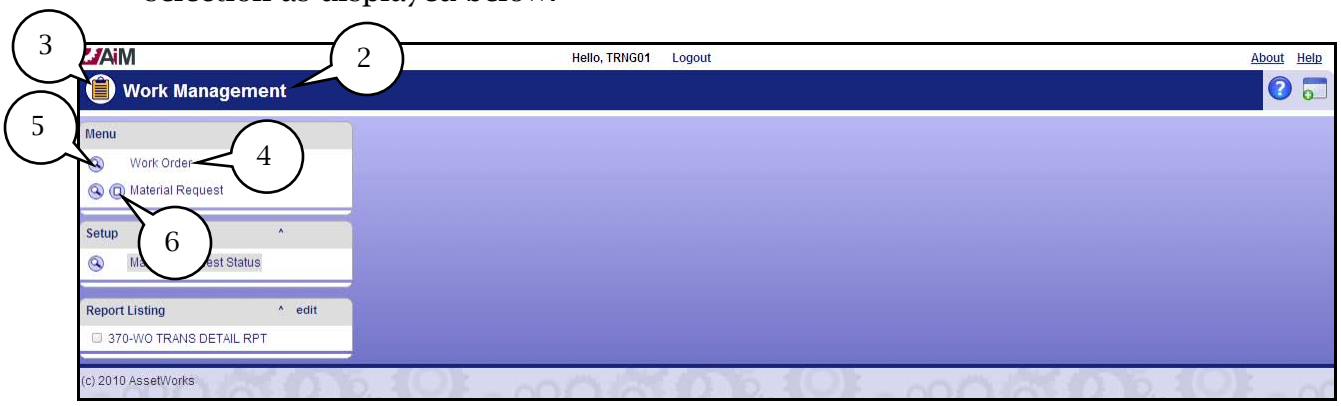
1. Select desired *Module*. *Module* will be displayed.
2. Select desired Screen. Screen will be displayed.

Selecting A Module

When working with a *Module*, screens are available for selection allowing required activity to be performed based on the user's role.



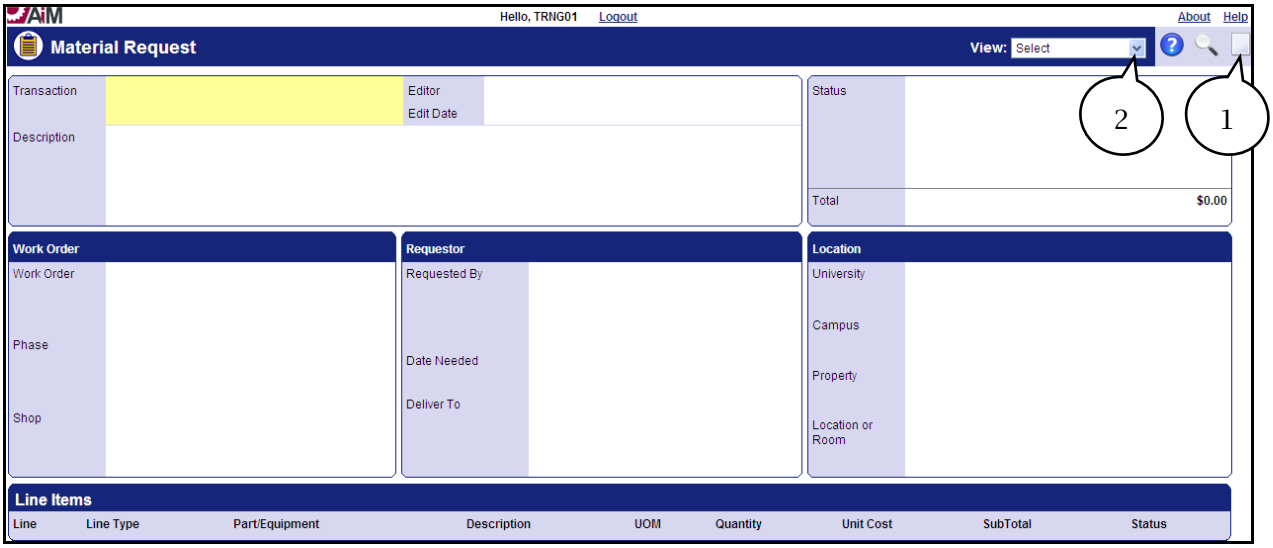
1. To select a *Module* place cursor over the desired ***Module*** and click to select. *Module* will be displayed. Once in a Module a list of screens will be available for selection as displayed below.



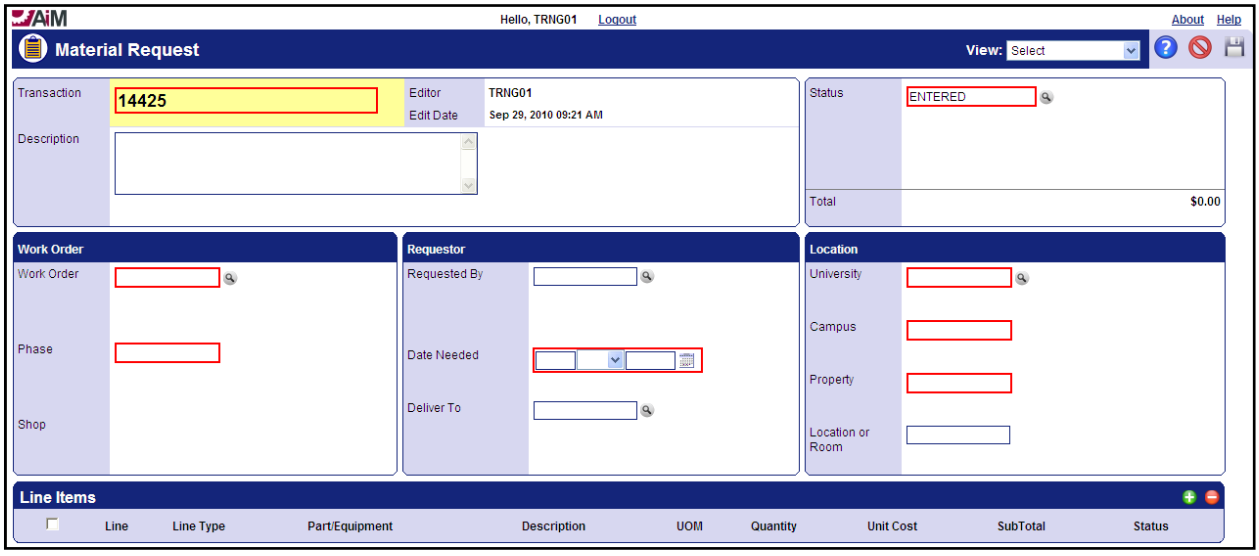
2. Selected *Module* and *Menu* options will be displayed.
3. The Icon identifying the *Module* will be displayed. When working in a screen, clicking on the *Module* Icon will return the *Module* Menu.
4. To go directly to a Screen, click on desired **Screen** name from the menu list.
5. The **Search** icon directly opens the *Search* options for that screen, allowing a quick search of a record or data on the screen displayed.
6. By clicking on the **New** icon, it opens a new record in edit mode, ready for information to be entered.

Working in a Screen

Once a screen is open it will always be in a query state. To create a new or edit a record, use the applicable icons displayed in the header on the right hand corner of the main title bar.



1. To request new *Material Request* click on the **New** icon which will open the screen and place it in a ready state for fields to be completed.
2. The **View** field provides additional screens available while working within a screen.

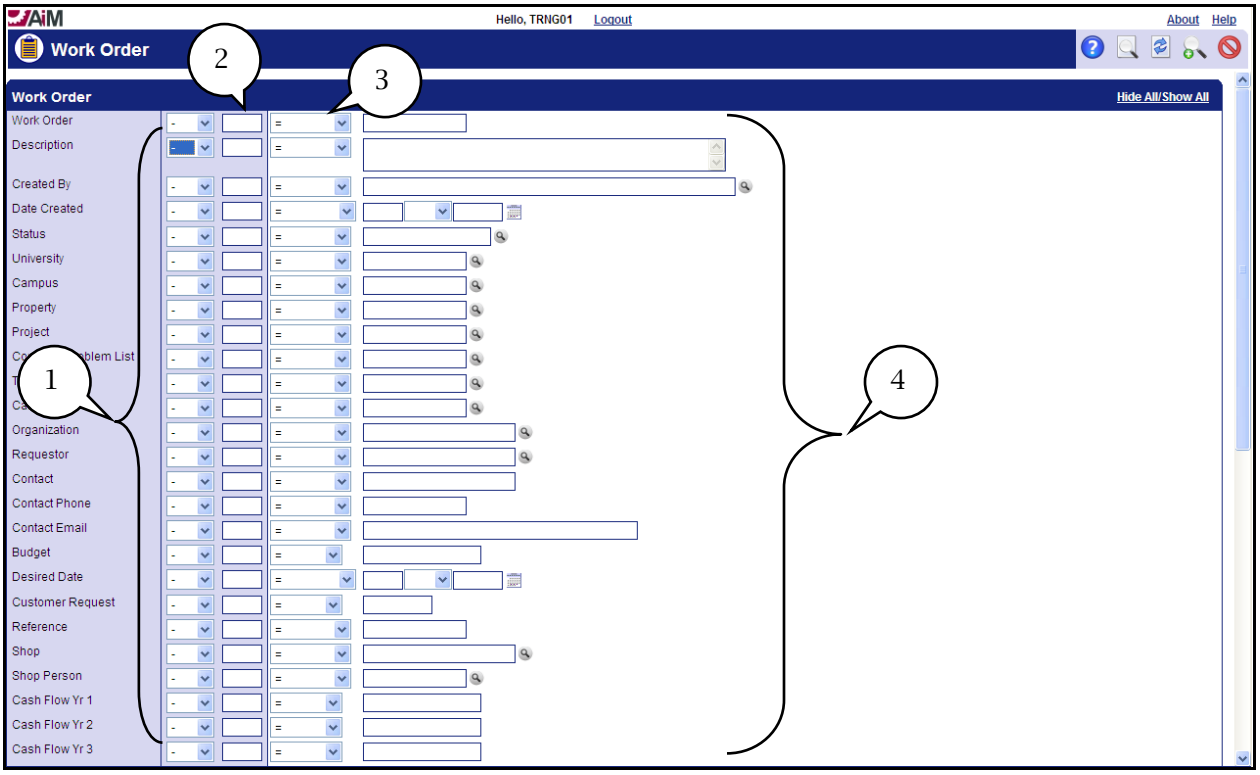


3. When working on a new screen or editing a screen, required fields are outlined in red. Information is segmented into data Blocks with headings (example: above shows **Work Order, Requestor** and **Location** blocks).

Search Screen Defined

The *Search* screen is a very powerful option within the application that gives users the ability to perform various types of searches based on criteria entered. This section will provide a general overview and introduction of the options available on the *Search* screen. The *Module* displayed will determine the data criteria that are available for selection.

When performing a *Search* ask the question, "What information am I looking for?" This will assist when keying in the exact criteria needed to perform the *Search*.



With the *Search* screen displayed perform a search by using the various search options listed below.

1. **Ascending/Descending** fields. This option can be used to have search results in Ascending/Descending order. From the drop down list make desired selection.
2. **Sort sequences** fields. This is optional and not required to perform a *Search*. To sort your *Search* results in a specific order you can use the *Sort Sequence* fields. In the box enter your order by placing 1, 2, etc. This will display and sort the fields on the results screen.

3. **Operator** (text qualifiers) field, drop down box: Use any of the standard operations to assist in narrowing searches to find the exact information desired.

Standard Operations

=	Equal
<	less than
>	greater than
>=	greater than or equal to
<=	less than or equal to
<>	not equal to
Starts with (starts w/string entered)	
Ends with (ends w/string entered)	
Contains (contains the string entered anywhere in the field)	
Null (must contain a value)	
Not null (must Not contain a value)	
In (list items to include)	
Not in (list items to omit)	
Between: Dates only (fill in as required)	
Within: Dates only (fill in as required)	
Older than (select desired option)	
Newer than (select desired option)	

4. **Criteria** field: Within the field box, enter the information needed to perform the search, or by using the **Zoom** icon the appropriate selection options will be displayed.

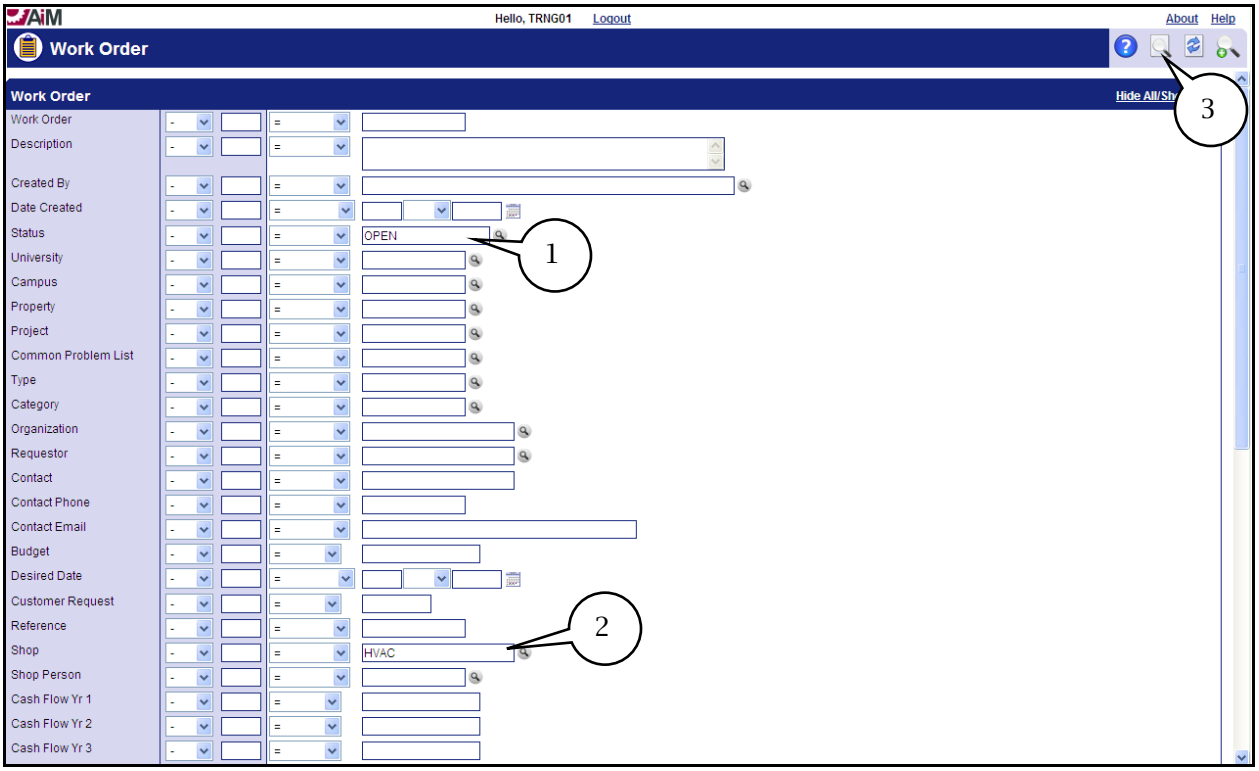
Note: If searching in a *Description* field, consider selecting *Contains* from the operator field and then using the *Wild Card %* (percent sign) before and after the criteria entered to define your *Search*. It is recommended to keep a *Search* to one or two words. Example: looking for the word "Air", enter %Air% in the description field. If using two words, enter %Air%%conditioning%.

While working in the Search Screen you may find that some fields may be hidden. To display hidden fields click on *Show* if you want to hide fields click on *Hide*.

Performing a Search Query

Below is an example of performing a *Search Query*. Remember based on your *Module* selection, criteria fields displayed may vary.

With the *Search* screen displayed, search for all open work orders for a shop by completing the following steps.



1. Type "**open"** in the **Status** field (fields are not case sensitive).
2. Type "**HVAC**" or desired *Shop* in the **Shop** field.

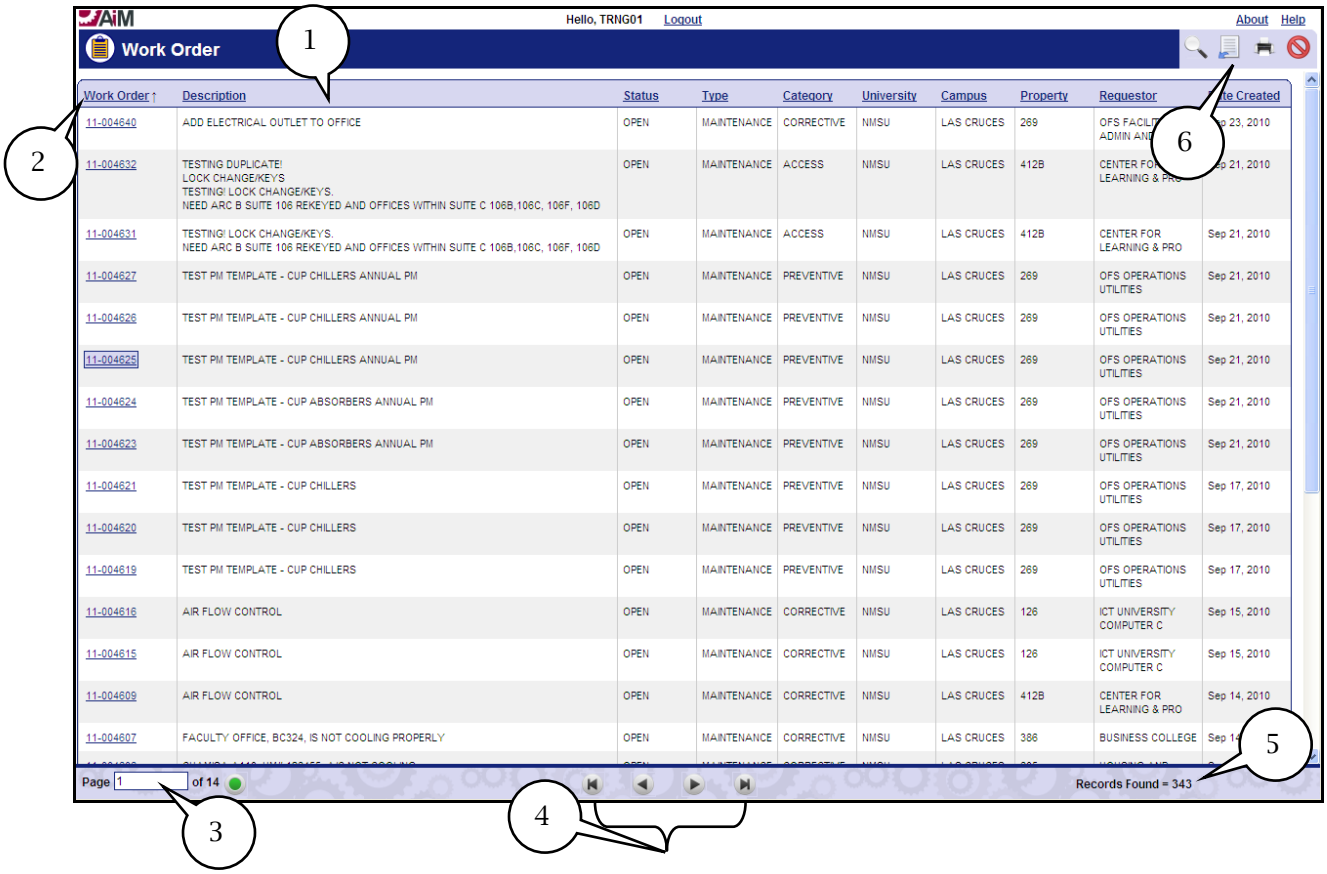
   Note: To display a listing of the data fields, use the *Zoom* icon. Leave the Shop field blank. Click on the *Zoom* icon and select a shop.

3. Click on the **Search** icon located on the main title bar.
4. The search results will be displayed based on the criteria entered.
5. To perform another query, go back to the *Search* screen (click *Search* icon) and make modifications to run another *Search*.

To return to the *Module* Menu click on the *module* icon to the left of the *Module* title.

Looking at your Search Query Results

With the search results displayed review the screen below.



Work Order	Description	Status	Type	Category	University	Campus	Property	Requestor	Date Created
11-004640	ADD ELECTRICAL OUTLET TO OFFICE	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	269	OFS FACILI ADMIN AN	23, 2010
11-004632	TESTING DUPLICATE! LOCK CHANGE/KEYS TESTING! LOCK CHANGE/KEYS. NEED ARC B SUITE 106 REKEYED AND OFFICES WITHIN SUITE C 106B,106C, 106F, 106D	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	412B	CENTER FO LEARNING & PRO	p 21, 2010
11-004631	TESTING! LOCK CHANGE/KEYS. NEED ARC B SUITE 106 REKEYED AND OFFICES WITHIN SUITE C 106B,106C, 106F, 106D	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	412B	CENTER FOR LEARNING & PRO	Sep 21, 2010
11-004627	TEST PM TEMPLATE - CUP CHILLERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004626	TEST PM TEMPLATE - CUP CHILLERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004625	TEST PM TEMPLATE - CUP CHILLERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004624	TEST PM TEMPLATE - CUP ABSORBERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004623	TEST PM TEMPLATE - CUP ABSORBERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004621	TEST PM TEMPLATE - CUP CHILLERS	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 17, 2010
11-004620	TEST PM TEMPLATE - CUP CHILLERS	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 17, 2010
11-004619	TEST PM TEMPLATE - CUP CHILLERS	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 17, 2010
11-004616	AIR FLOW CONTROL	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	126	ICT UNIVERSITY COMPUTER C	Sep 15, 2010
11-004615	AIR FLOW CONTROL	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	126	ICT UNIVERSITY COMPUTER C	Sep 15, 2010
11-004609	AIR FLOW CONTROL	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	412B	CENTER FOR LEARNING & PRO	Sep 14, 2010
11-004607	FACULTY OFFICE, BC324, IS NOT COOLING PROPERLY	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	386	BUSINESS COLLEGE	Sep 1

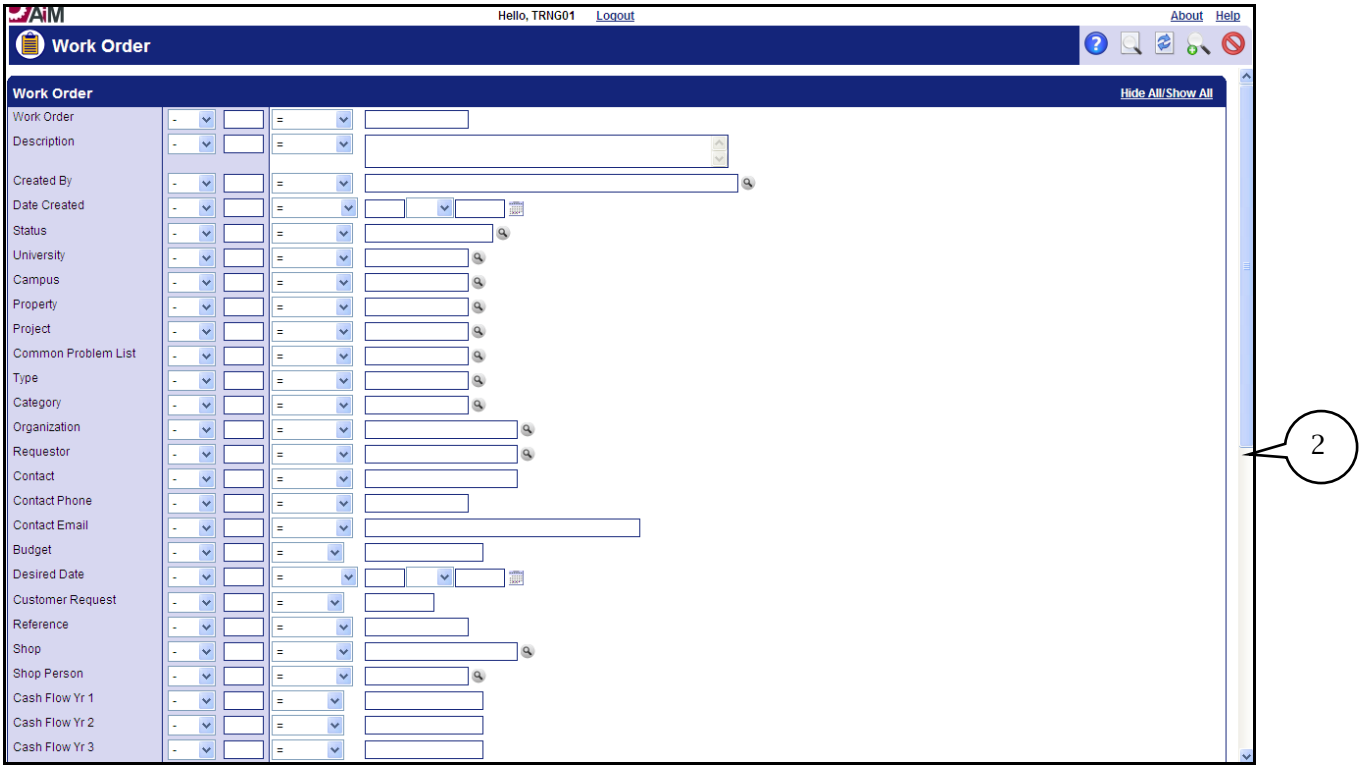
1. Column headings are **Work Order**, **Description**, **Status**, **Type**, **Category**, **University**, **Campus**, **Property**, **Requestor** and **Date Created**.
2. Columns can be sorted by clicking on one of the column headings.
3. ***Page Navigation*** is located at the bottom of the screen. This will represent the number of pages available for review. To go directly to a specific page, enter the page number in the field and click on the green **Go** icon.
4. *Page* (DVD) *Navigation*: forward/backward icons, and first page/last page icons.
5. **Records Found** identifies the number of records found for the search selection.
6. Icon bar displays the additional available icon options on the screen displayed. By holding your mouse over the icon, it displays the function of the icon.

Create a Personal Query

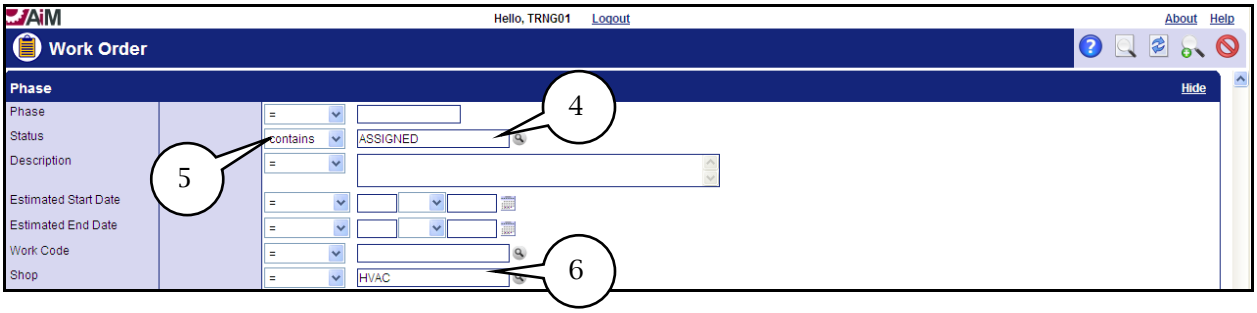
Personal Queries, that provide *Searches* for information specific to the users, can be created and added to the *WorkDesk* for easy access.

This example creates a *Personal Query* to list all work orders assigned to an employee.

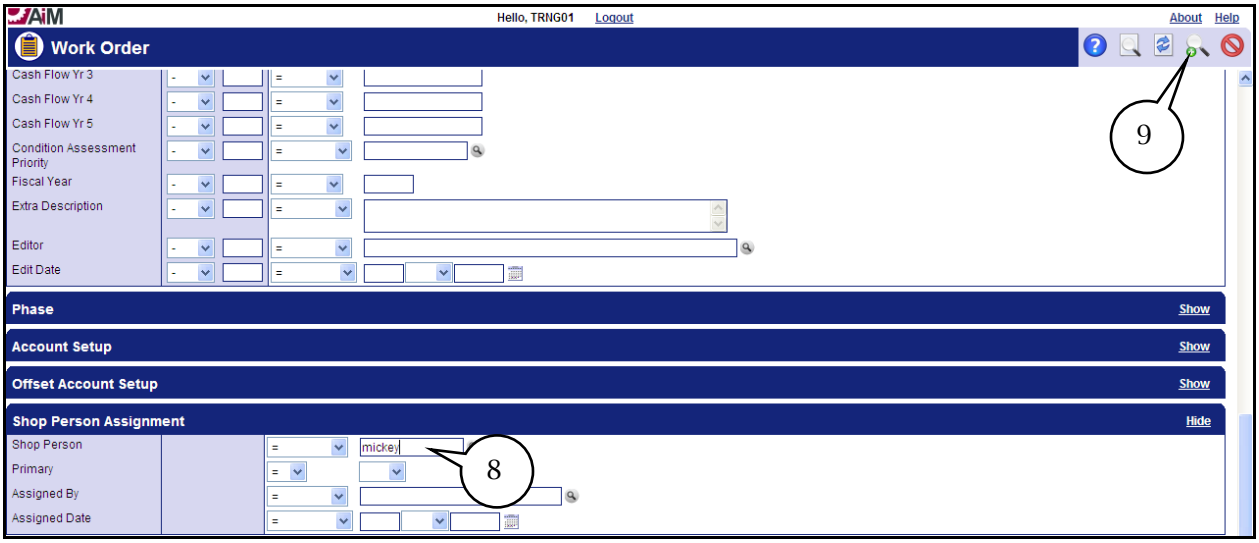
1. First open any *Search* screen and select **Work Order** from the **Work Management** *Module*.



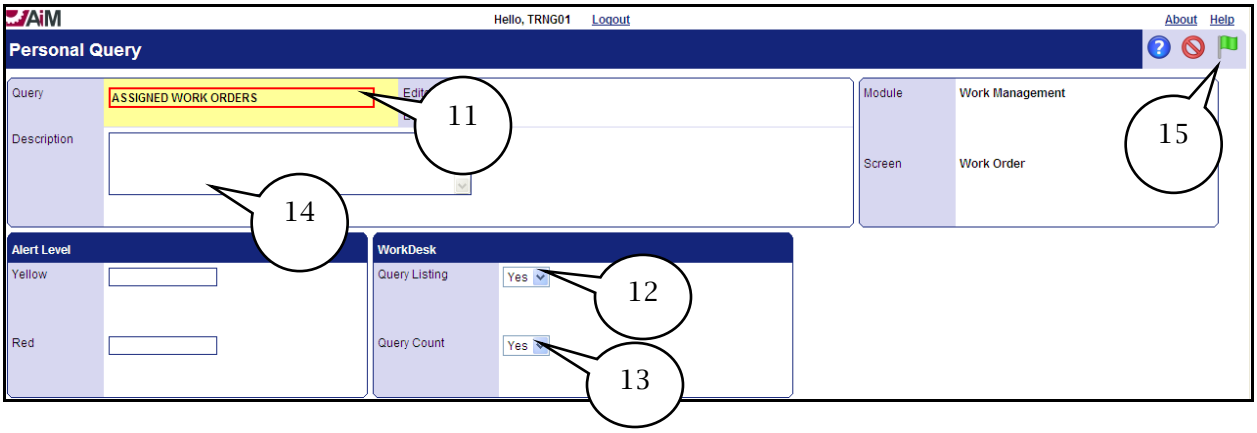
2. While working in the *Search* screen the scroll bar will be available.
3. With the *Search* screen displayed use the scroll bar, moving down, to locate the data elements **Status** and **Shop** under the **Phase** block.



4. Enter *Assigned* in the **Status** field.
5. Select **contains** from the operations field drop down list (click on the down arrow to display operation choices).
6. Enter the name of the shop in the **Shop** field, or click on the **Zoom** icon to select a *Shop*.
7. Scroll down again until you locate the **Shop Person Assignment** block.



8. Enter employee **User ID** in the **Shop Person** field box.
9. Click on the **Add Query** icon.
10. The following *Personal Query* screen will be displayed.

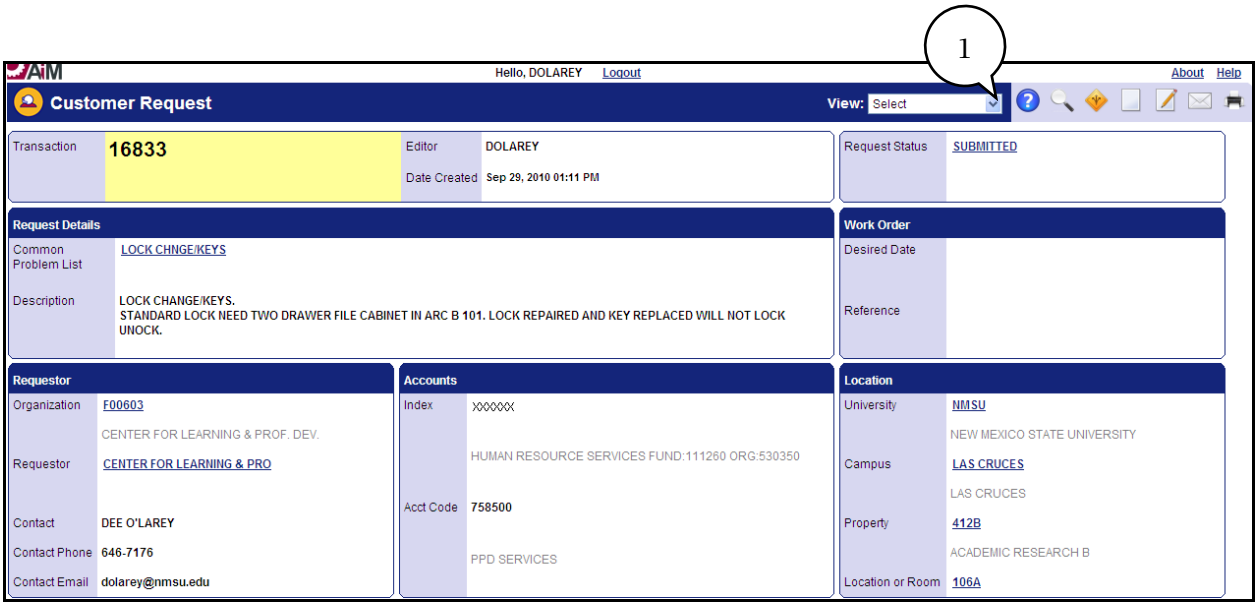


11. Enter a name for the *Personal Query* (e.g. Assigned Work Orders).
12. Click the arrow next to the **Work Desk** field and select **Yes** (results will be displayed in the *Personal Query* list on the *WorkDesk*).
13. Click the arrow next to the **Work Desk Count**, select **Yes**. This will provide a count in front of the work order *Personal Query* on the *WorkDesk*.
14. Though not required, the same information or name given to the *Personal Query* (step 11) can be entered in the **Description** field.
15. When finished click on the **Done** icon to return to the previous *Search* screen.
16. Click on the **Save** icon (not shown) located on the header.
17. Click on the AiM icon (not shown) to return to the *WorkDesk*.

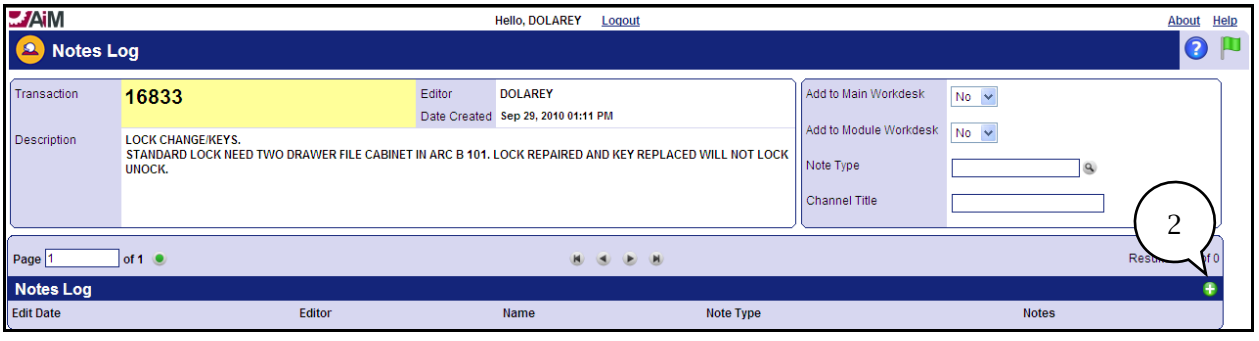
Using Note Logs

When creating a record (*Timecard, Customer Requests,* etc.) the *Description* field is often used; however, the number of characters (text) that can be entered is limited, and descriptions can be changed, deleted, etc. After creating and saving a record the *Notes Log*, which is a valuable feature in the AIM application, becomes available. The *Notes Log* is not limited in the number of characters (text) that can be entered and, once entered, becomes a permanent record.

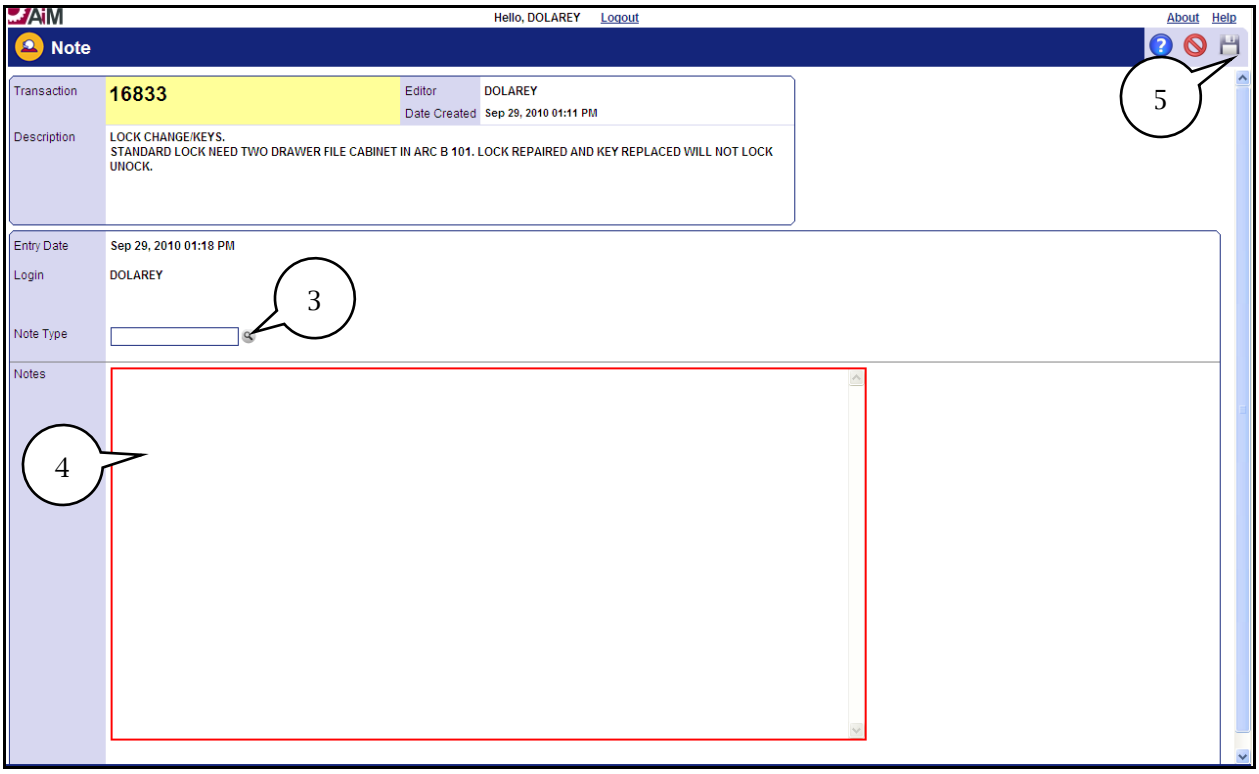
The following screen shot represents a record that has been created and saved in the AiM application. To use the *Notes Log*, complete the following steps.



1. Click on the **View Select** arrow, select **Notes Log** from the drop down list, and the following screen will be displayed.



2. Click on the **Add Notes** icon (green plus sign) and the following screen will be displayed.

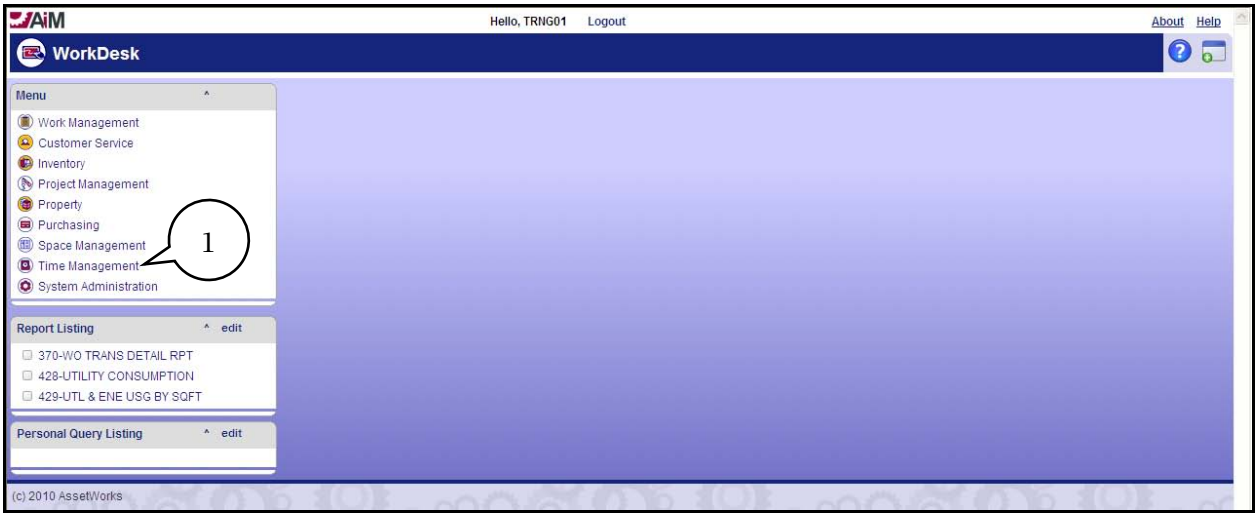


3. Click on the **Notes Type Zoom** icon and make the appropriate selection. For example, give *AUTHORIZATION* to use a specified index number.
4. Type the desired information in the **Notes** field. This will store the Note with the attached Customer Request.
5. Click on the **Save** icon.

Rapid Timecard Entry

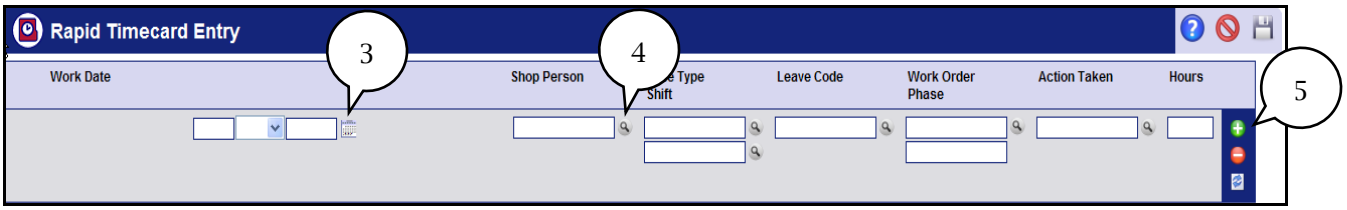
Employee *Timecards* are generated through the process of *Rapid Timecard Entry*. After employees complete the process of entering time, *Timecards* become available for supervisor review and approval. The following *Rapid Timecard Entry* steps must be completed for each day in the pay period.

After logging on, the AiM **WorkDesk** will be displayed.



1. Click on **Time Management** and the following screen will be displayed**.**

2. Click on **Rapid Timecard Entry** and the following screen, used to create default data for subsequent *Line Items*, will be displayed.

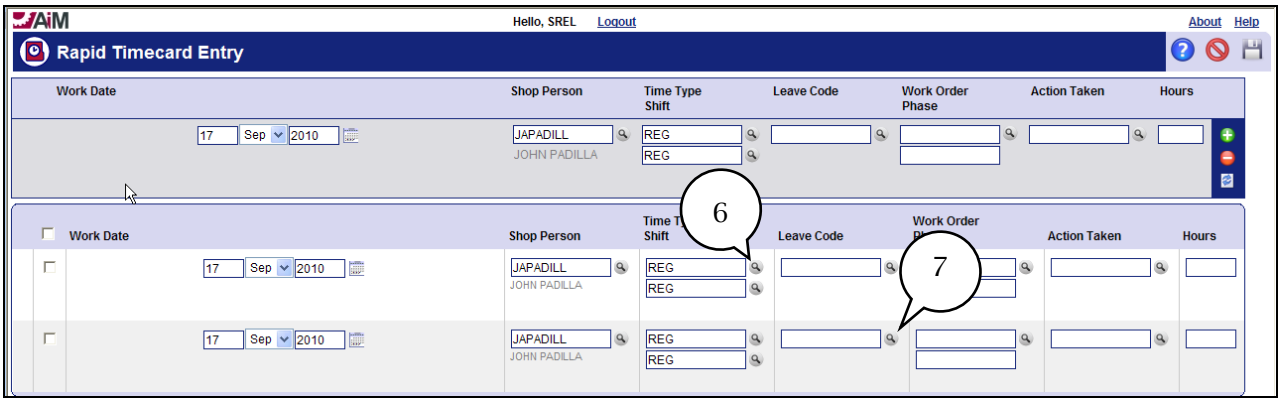


3. Select a **Work Date** by clicking on the calendar icon.
4. Enter employee *Username* in **Shop Person** field then click the **Zoom** icon which will validate the field if the *Username* is correct. Or click on the **Zoom** icon and select the appropriate **Employee ID**, or use the *Search* feature described in the *Search Query* section of this manual.

   Note: Time Type and **Shift** fields will automatically populate.

5. Click on the **Add Timecard Item** icon once for each *Line Item* that will be entered for the *Work Date* and the following screen will be displayed. For example, if the employee wants to record 4 hours of work on two different *Work Orders* click the *Add Timecard Item* icon twice to create two *Line Items*.

   Note: Default data selected in steps 3 & 4 will automatically populate to the added *Timecard Line Items*.

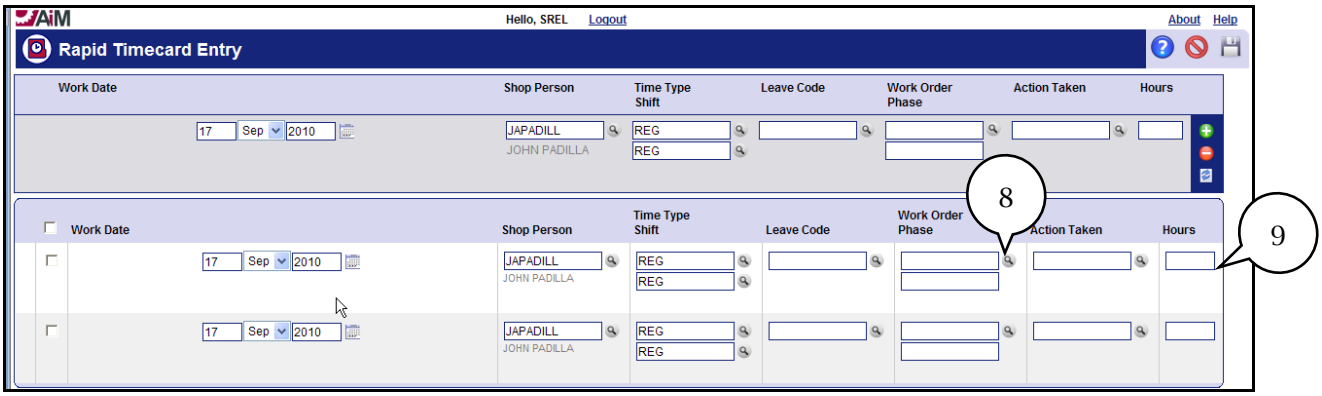


6. Click on the **Zoom** icons if **Time Type** (e.g. overtime, on-call pay, etc.) or **Shift** (e.g. swing or graveyard shift) fields need to be changed.

   Note: Any work performed over 8 hours for a *Work Date* (day) will be recorded as overtime.

7. If leave was taken, click on the **Zoom** icon and select the appropriate **Leave Code**.

   Note: *Time Type* and *Shift* fields will clear.



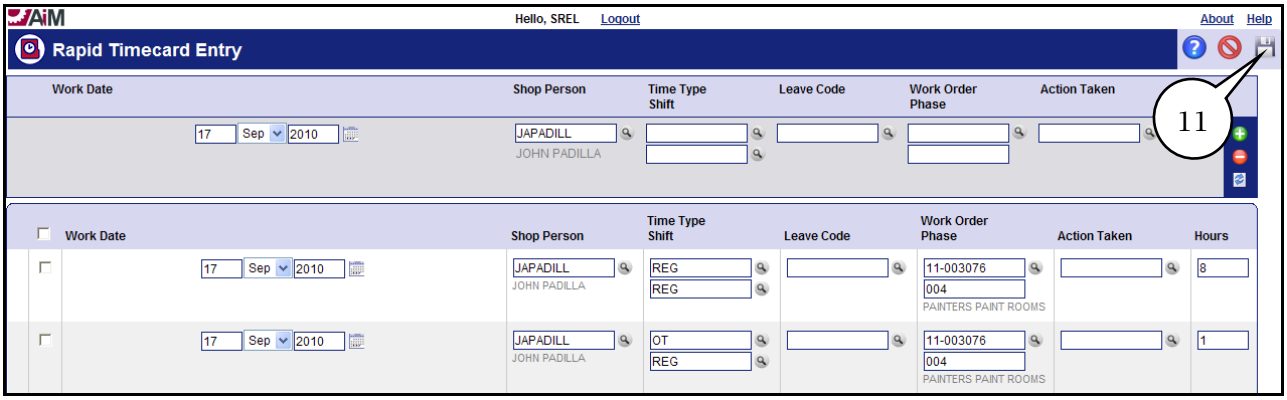
8. Enter work order and phase numbers in **Work Order** and **Phase** fields, or click on the **Zoom** icon to use the *Search* feature described in the *Search Query* section.

   Note: A *Work Order* is established to record *Administrative* time, and will have a different *Phase* for each calendar month.

9. Enter the hours worked, or leave, for this *Work Date Line Item*. A standard *Work Date* (day) is 8 hours.

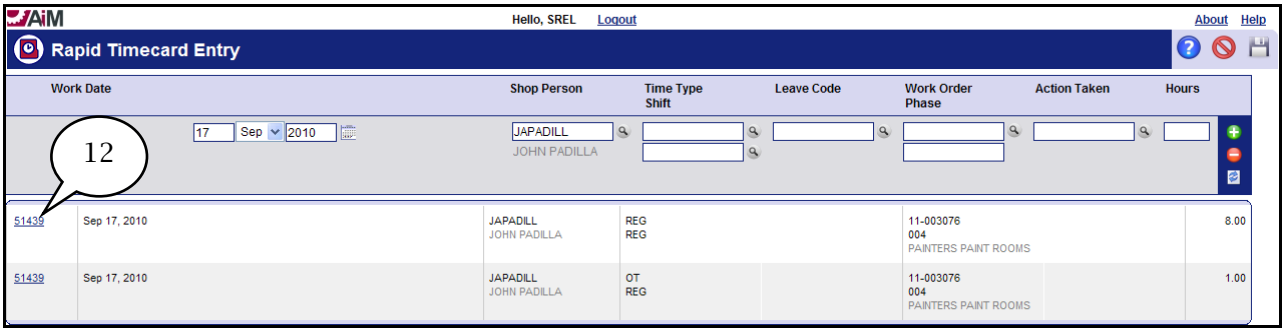
   Note: Time must be entered in one hour and/or one-quarter hour increments. For example: .5=1/2 hour, 1.0=1 hour, 1.25=1 1/4 hours, 1.5=1 1/2 hours, and 1.75=1 3/4 hours.

10. Repeat steps 8-11 for each *Line Item*. After entering information, the screen will look like the one below.

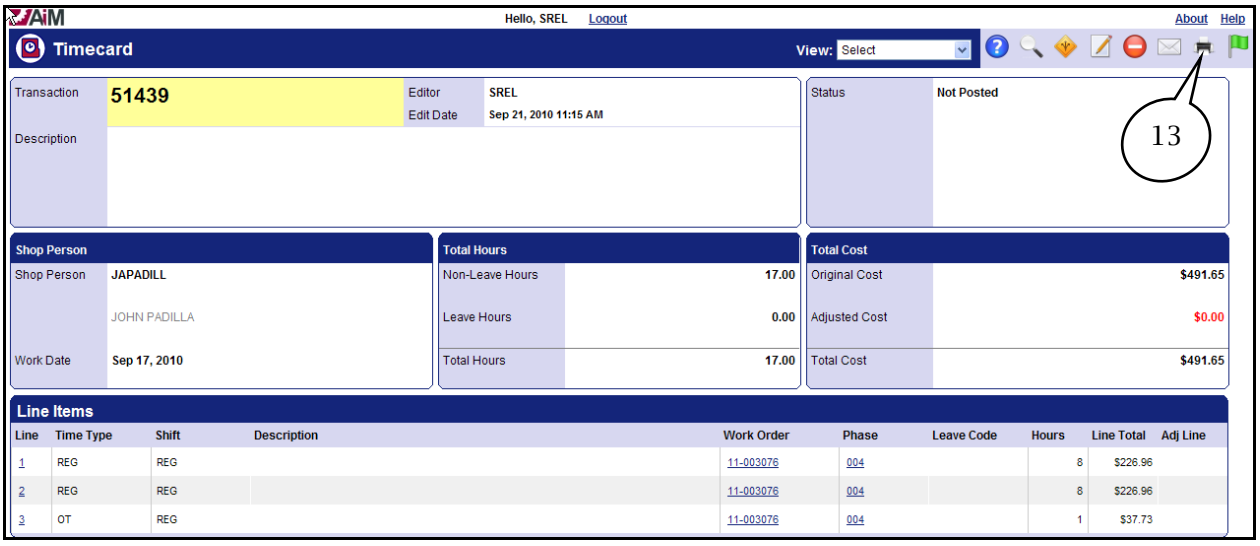


11. Review all data entry for accuracy and click on the **Save** icon. The following screen will be displayed and the *Timecard* is now available for supervisor approval.
12.

    Note: If an employee has not been assigned to a *Work Order Phase,* when the *Rapid Timecard Entry* is saved in Step 11 a screen will be displayed which states, "Shop person not assigned to the phase. Do you want to continue?" Click on the *Yes* icon.



13. Click on the *Timecard* number and the following *Timecard* screen will be displayed.



14. Print the *Timecard* by clicking on the **Print** icon and give to the supervisor.

Depending on the work performed on a particular day, more than one *Timecard Line Item* may be required

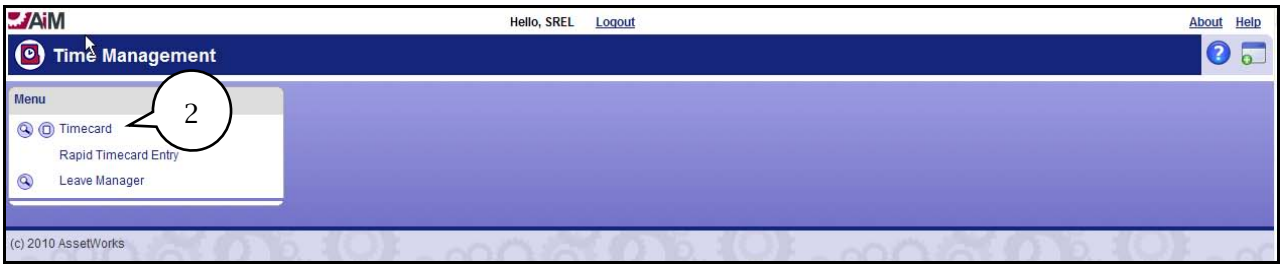
The Rapid Timecard Entry process is now complete!

Corrections/Changes to a Timecard

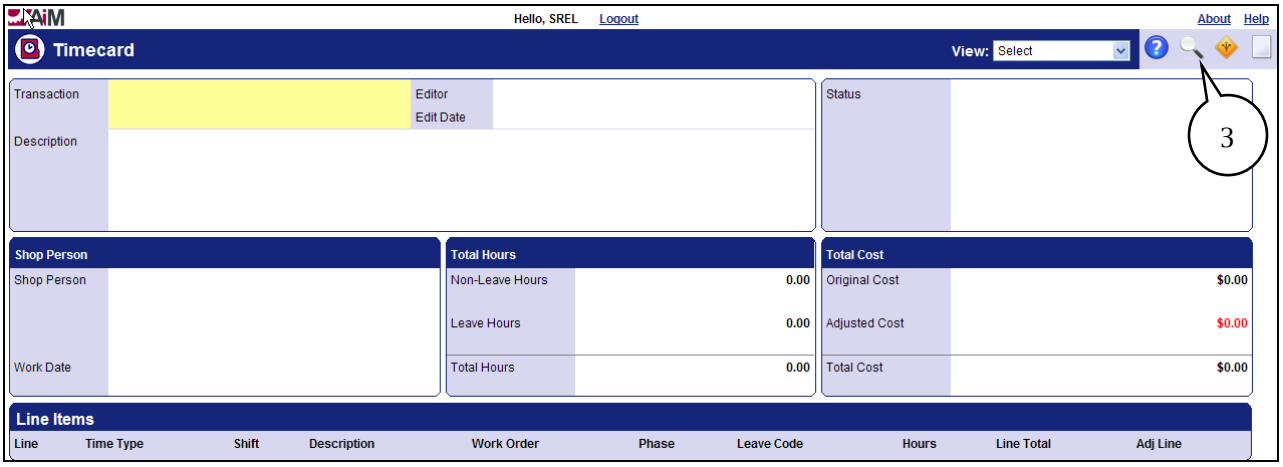
Changes can be made to a *Timecard* as long as it **has not been approved** by the supervisor, after which the supervisor must request a time card adjustment through OFS Human Resources. If a *Timecard* is *Rejected* by the supervisor, employees will have a *Personal Query* link on their AiM *Work Desk* to alert them of *Timecard Rejections*. *Line Items* originally entered through *Rapid Time Entry* can be deleted from the *Timecard* and new *Line Items* can be added.

To make changes to a *Timecard*, the following steps must be completed.

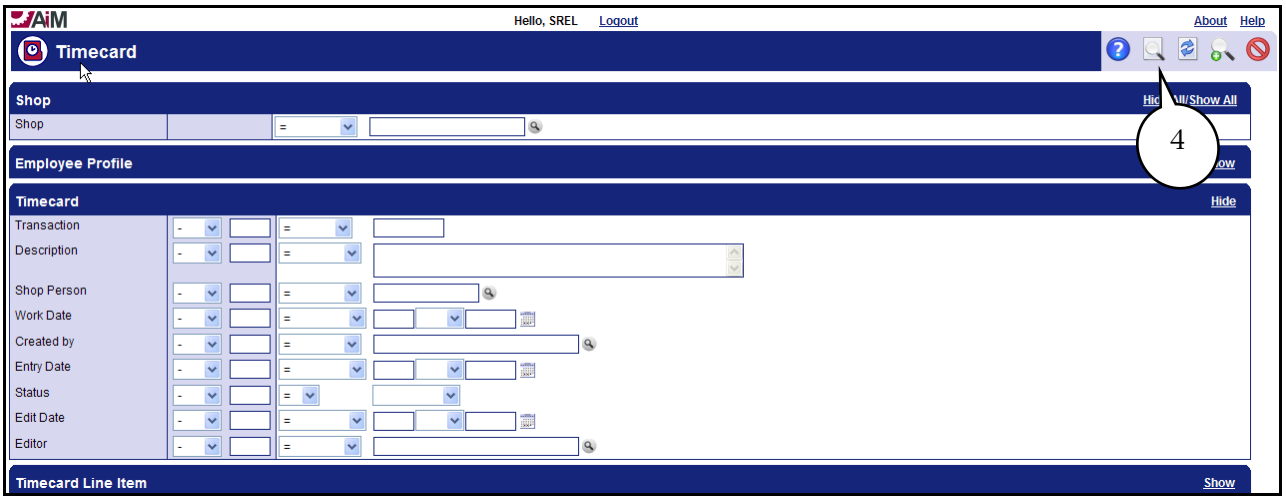
1. Select the **Time Management** module and the following menu will be displayed.



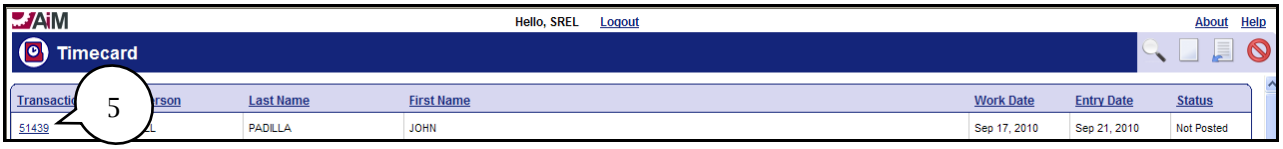
2. Click on **Timecard** and the following screen will be displayed.



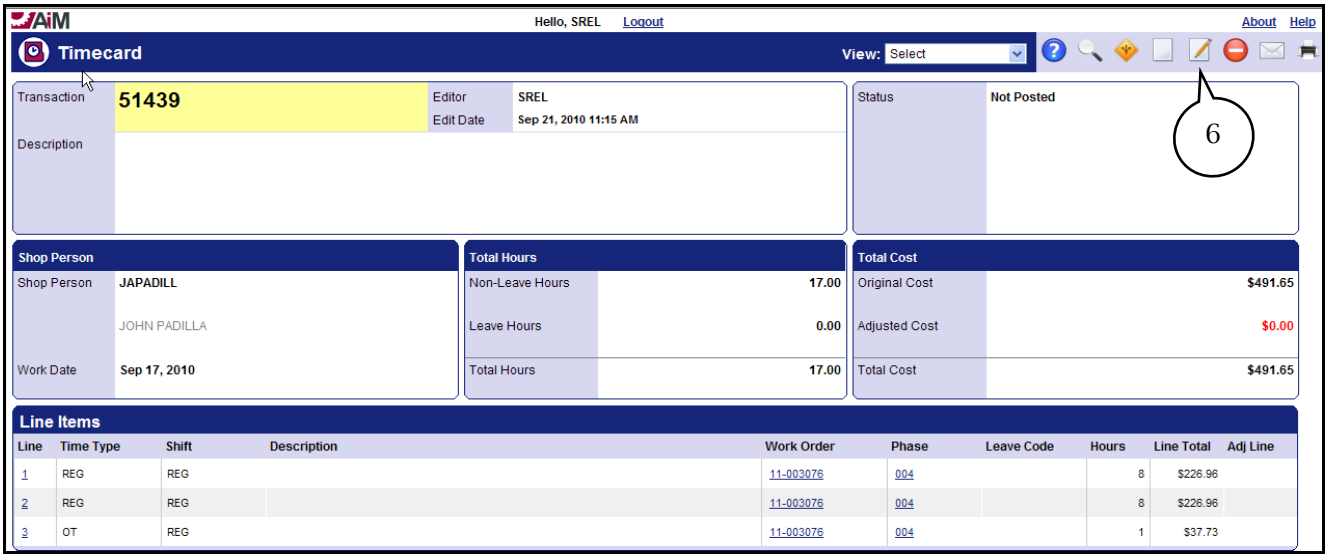
3. To locate the *Timecard* that needs to be changed, click on the **Search** icon and the following screen will be displayed. Or use the *Search* feature as described in the *Search Query* section.



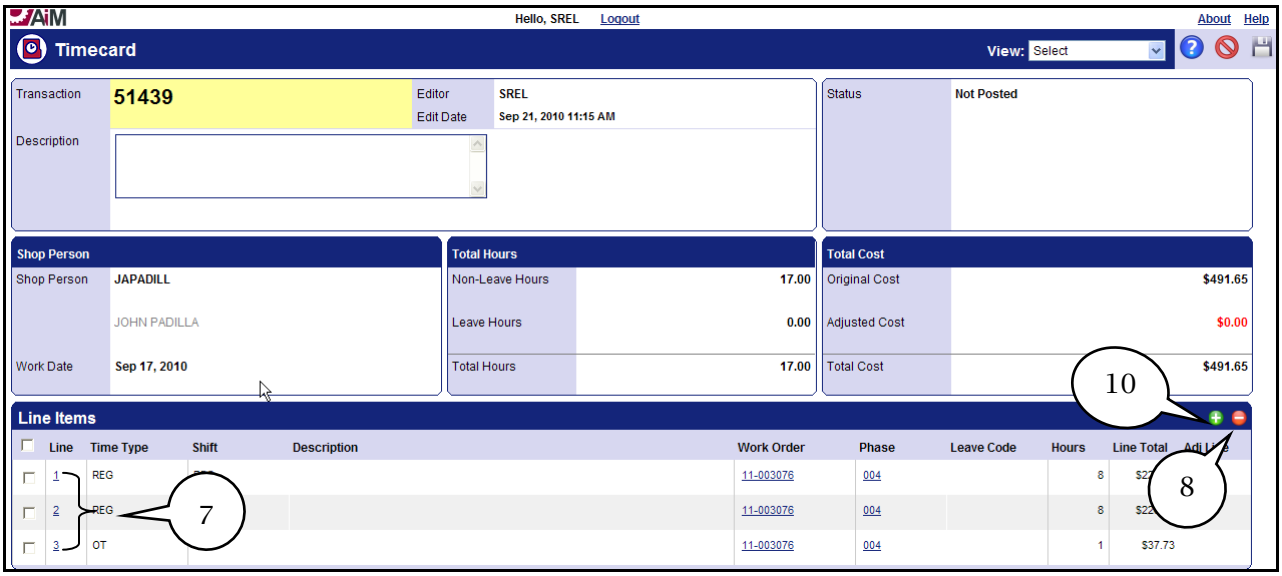
4. Click on the **Execute Search** icon and the following screen will be displayed.



5. Select the **Transaction number** (*Timecard*), associated with the **Shop Person** and **Work Date,** that needs to be changed and the following screen will be displayed.

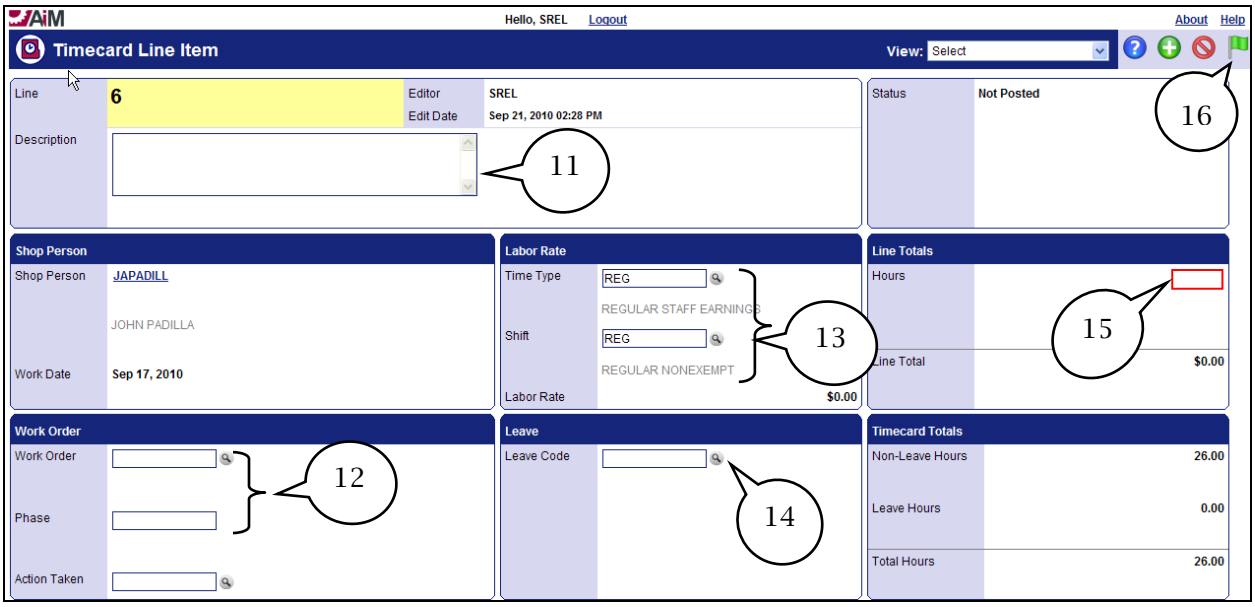


6. Click on the **Edit** icon and the following screen will be displayed**.**

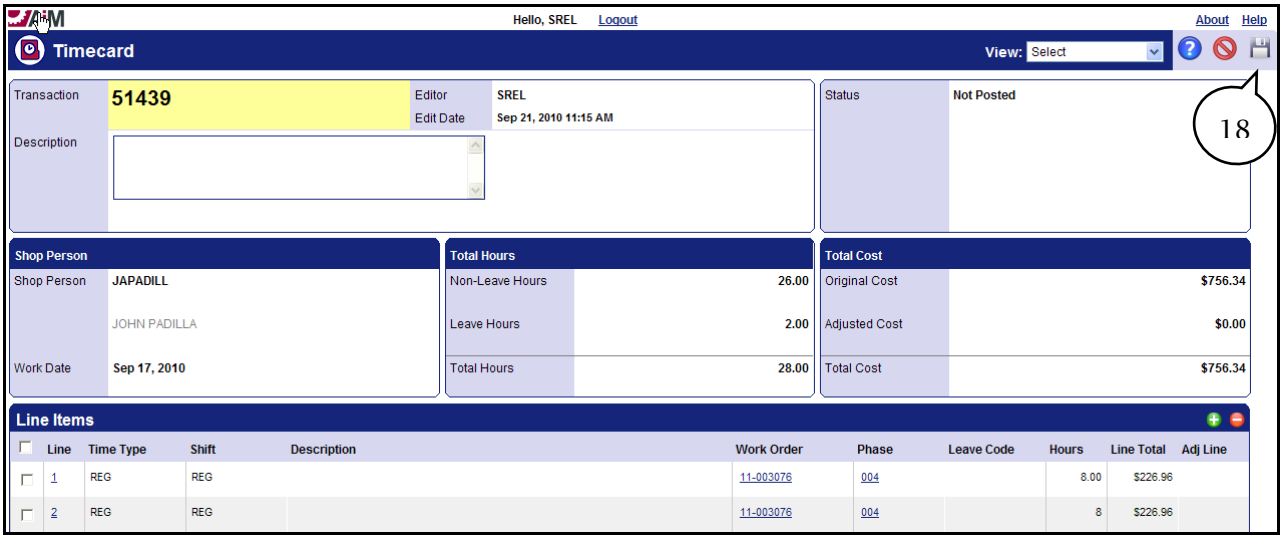


7. To delete a *Line Item*, click on the box to the left of the **Line** number and a check mark will appear in the box.
8. Click on the **Delete Timecard Item** (red subtraction sign) icon and the following screen will be displayed.

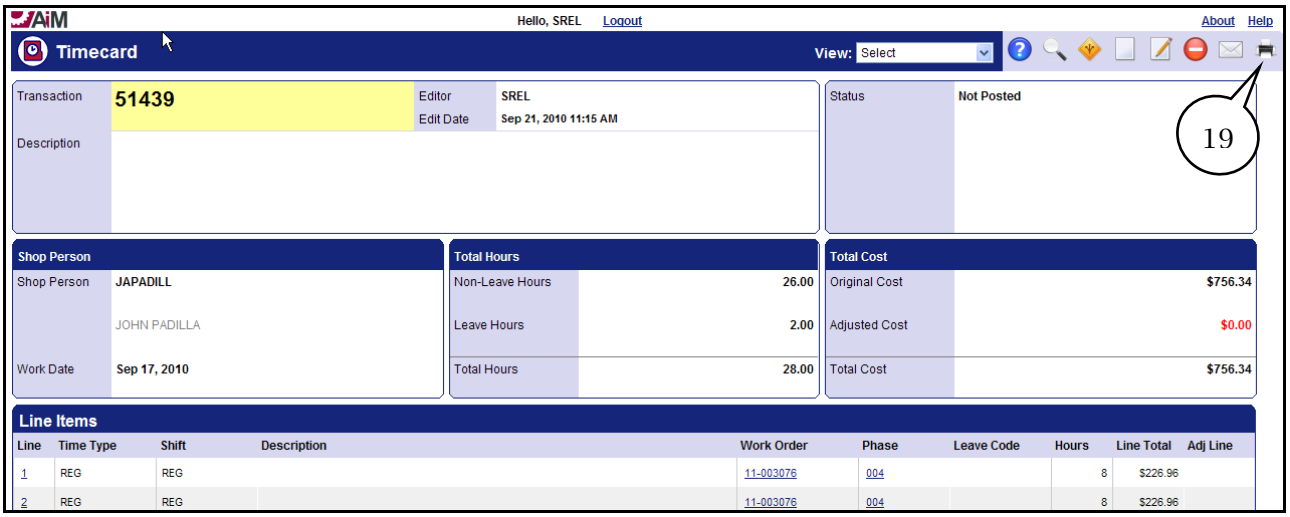
9. Click on the **YES** icon (green check mark) to delete the *Line Item* or the **NO** (red "X") icon if a *Line Item* has been selected in error. Repeat steps 7-9 if additional *Line Items* need to be deleted.
10. To add new *Line Items* click on the **Add Timecard Item** icon (green plus sign) and the following screen will be displayed. If no new *Line Items* are needed, go to step 18.



11. Enter a **Description** (optional).
12. Enter work order and phase numbers in **Work Order** and **Phase** fields, or click on the **Zoom** icon to use the *Search* feature described in the *Search Query* section.
13. Click on the **Zoom** icons if **Time Type** (e.g. overtime, on-call pay, etc.) and **Shift** (e.g. swing or graveyard) fields need to be changed.
14. If leave was taken, click on the **Zoom** icon and select the appropriate **Leave Code**.
15. Enter the hours worked, or leave, for this *Work Date Line Item*.
16. Click on the **Done** icon. Repeat steps 10-16 if additional *Line Items* need to be added.
17. After clicking on the **Done** icon, the following screen will be displayed.



18. Click on the **Save** icon and the following screen will be displayed.



19. Print the corrected *Timecard* by clicking on the **Print** icon and give to the supervisor.

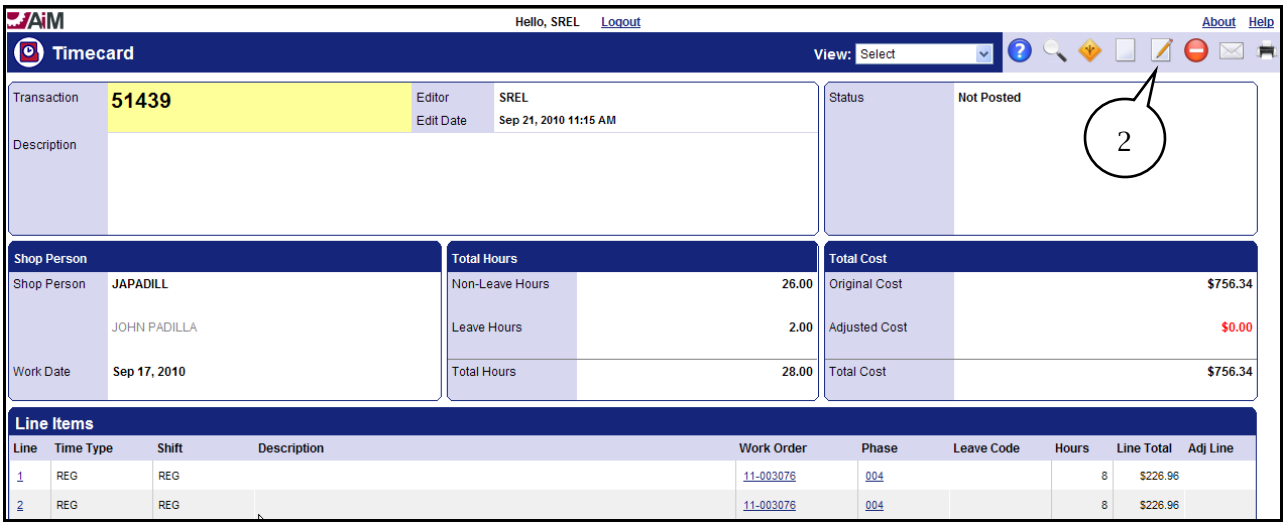
Corrections/Changes can be made to *Timecards* any time prior to supervisory *Approval/Rejection* by following the previous steps.

The Corrections/Changes to a Timecard process is now complete!

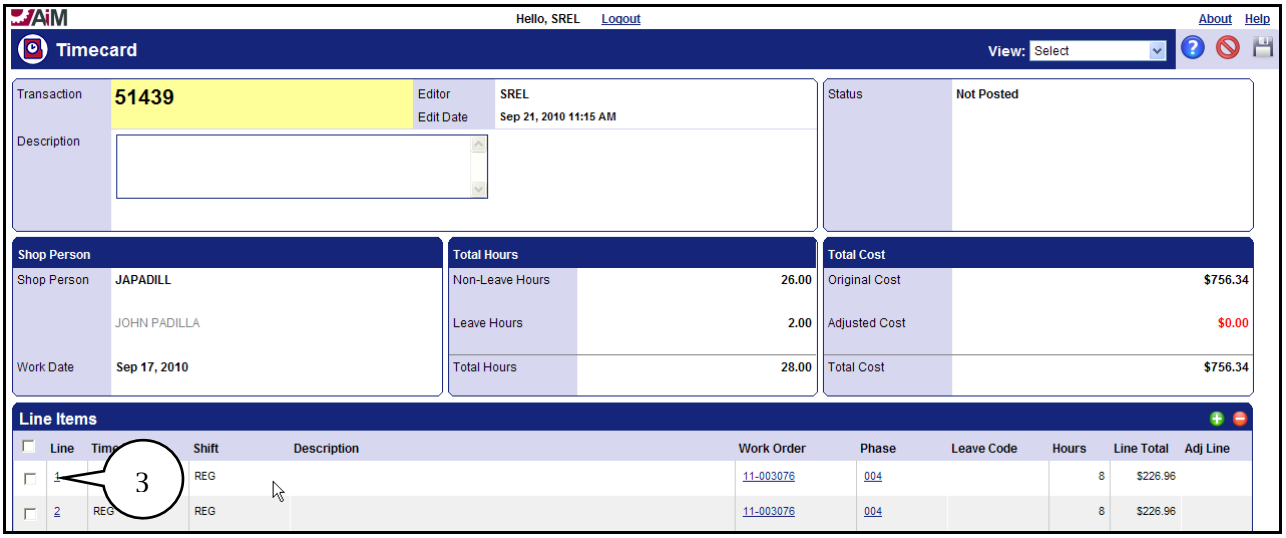
Adding Descriptions to Timecards

When entering time through *Rapid Timecard Entry*, descriptions cannot be provided for *Line Items* entered; however, descriptions can be added by going to the employee *Timecard* and completing the following steps.

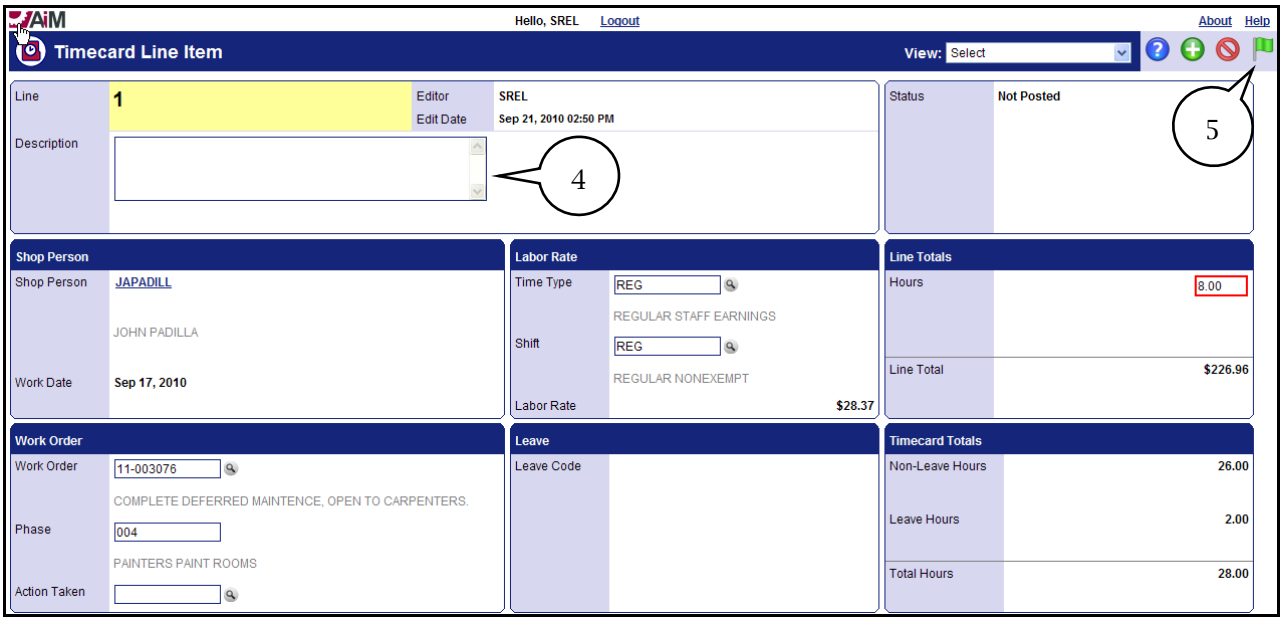
1. Select a *Timecard* and the following screen will be displayed.



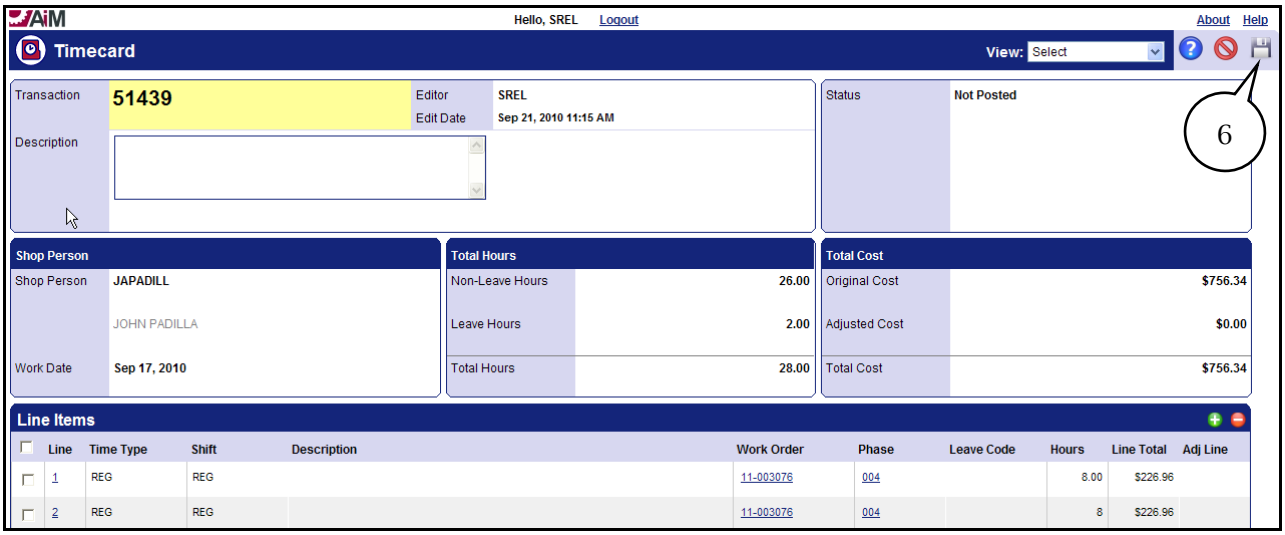
2. Click on the **Edit** icon and the following screen will be displayed.



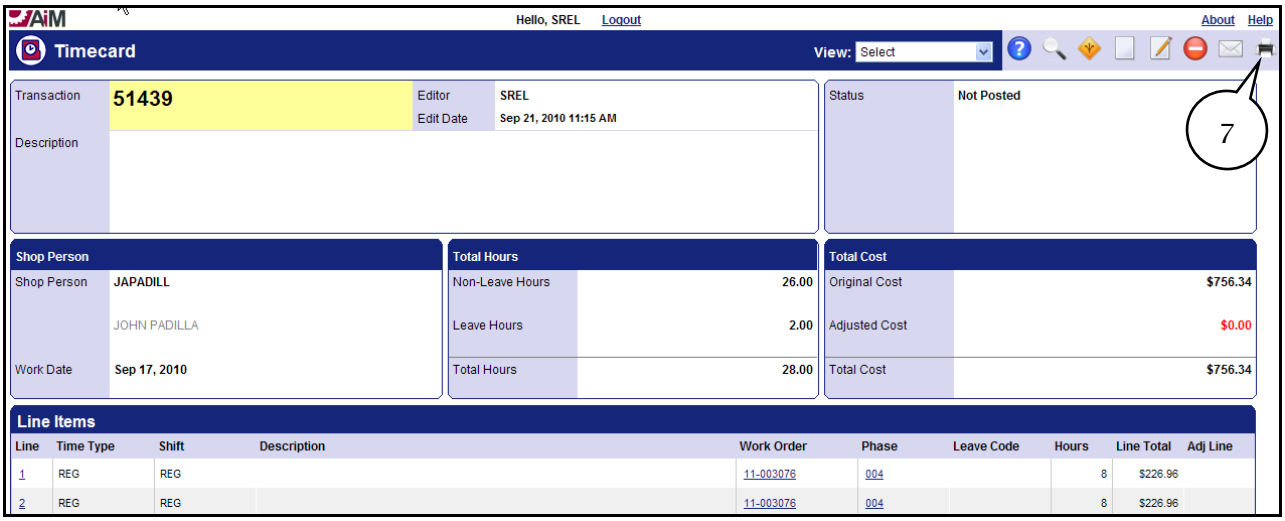
3. Click on the **Line Item** number that needs a description and the following screen will be displayed.



4. Type a description in the **Description** field.
5. Click on the **Done** icon and the following screen will be displayed. Repeat steps 3-5 as needed.



6. Click on the **Save** icon and the following screen will be displayed.



7. Click on the **Print** icon to print the *Timecard*.

The Adding Descriptions to Timecards process in now complete!